

Retention and Classification Report

Agency: Tooele County (Utah). County Assessor (1834)
Tooele County Courthouse
47 South Main
Tooele, UT 84074

Records Officer Marilyn Gillette

05522	Annual personal property listing report
05520	Daily personal property transaction report
05521	Monthly personal property report
28739	Property cards

AGENCY: Tooele County (Utah). County Assessor

SERIES: 5522

3

TITLE: Annual personal property listing report

DATES: 1985-

ARRANGEMENT: Chronological, thereunder numerical by receipt code

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

This is an annual computer report on personal property tax collections. It is used for reference and audit purposes. At the end of the year the monthly reports (series 5521) are compiled into the annual report. It includes date, receipt code, transaction type, amount taxable, total applied interest adjustment amount, net tax, transaction amount, balance due, district number, and a summary by taxing district.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years and then destroy.

APPRAISAL:

Administrative Fiscal

This disposition is based on the primary administrative and fiscal needs of the agency. It is maintained for the basic 3 year state audit period.

AGENCY: Tooele County (Utah). County Assessor

SERIES: 5520

3

TITLE: Daily personal property transaction report

DATES: 1985-

ARRANGEMENT: Chronological, thereunder numerical by receipt code

ANNUAL ACCUMULATION: 1.50 cubic feet.

DESCRIPTION:

This is a daily computer report on personal property tax collections. It is used for reference purposes and for verification. At the end of each month the daily reports are compiled into a monthly report (series 0552). The report includes date, receipt code, transaction type, amount taxable, total applied interest adjustment amount, net tax, transaction amount, balance due, district number, and a summary by taxing district.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then destroy.

APPRAISAL:

Administrative

This disposition is based on the record's primary value to the agency. The daily report has no value after the monthly reports have been verified.

AGENCY: Tooele County (Utah). County Assessor

SERIES: 5521

3

TITLE: Monthly personal property report

DATES: 1985-

ARRANGEMENT: Chronological, thereunder numerical by receipt code

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

This is a monthly computer report generated from the daily report (series 05520) on personal property tax collections. It is used for reference purposes and for verification. These monthly reports are compiled at the end of the year into an annual report. The monthly report includes date, receipt code, transaction type, amount taxable, total applied interest adjustment amount, net tax, transaction amount, balance due, district number, and a summary by taxing district.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 18 months and then destroy.

APPRAISAL:

Administrative

This disposition is based on the records primary administrative value to the agency. It has no value after the annual report has been verified.

AGENCY: Tooele County (Utah). County Assessor

SERIES: 28739

3

TITLE: Property cards

DATES: 1900-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION:

DESCRIPTION:

These records support the agency's function to assist in the calculation of property taxes by determining the value of properties which are subject to taxation in the county (Utah Code 59-2-1302(2011)). Records document the value and taxes or uniform fees for property. Information includes the property's address, description, owner contact information, and related information.

RETENTION:

Retain 5 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 11, Item 1.

AUTHORIZED: 07/30/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Computer data files: For records beginning in 1900 and continuing to the present. Retain in Office for 5 years and then transfer to State Archives with authority to weed.

Paper: For records beginning in 1900 through 2015. Retain in State Archives permanently with authority to weed.

AGENCY: Tooele County (Utah). County Assessor

SERIES: 28739

TITLE: Property cards

(continued)

APPRAISAL:

Administrative Historical

These records are of historical interest as they document land use and value to taxable properties within the county.

PRIMARY CLASSIFICATION:

Public